

May/June 2018 AIM Heritage Trustee Newsletter – **EXTRACTS**

Prospering Boards at AIM conference

For trustees attending this year's AIM conference on 21 – 23 June, don't miss out on a session sharing some of the lessons learned from AIM's Prospering Boards programme of one-to-one support for boards and trustees. Chaired by AIM's Assistant Director, Helen Wilkinson, the session features presentations by Sam Hunt, an independent consultant, and Nicky Oliver, trustee of the Priest's House Museum. The session takes place on Day 2 of the conference and will also launch the new round of the programme. Full conference details are available here: <https://www.aim-museums.co.uk/events/aim-national-conference-2018/>

If you're not able to join us at the conference, full details of the new programme will be available on the AIM website.

Induction for new trustees

The Charity Commission has launched a new induction pack to welcome trustees to their role. It's available online and will be emailed direct to any new trustees on request. For more information, see: <https://www.gov.uk/government/news/new-welcome-pack-for-charity-trustees>

While the core responsibilities of trustees are common to all kinds of charities, there are some things museum trustees need to pay particular attention to and which might be unfamiliar to a trustee from outside the sector. AIM has a guide to the sector written for new trustees from a non-museum background, available at: <https://www.aim-museums.co.uk/wp-content/uploads/2018/04/AIM-Guides-for-Boards-An-introduction-to-museums-for-new-trustees.pdf>

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Charity sustainability

The fundraising organisation, Local Giving, has produced its annual Local Charity and Community Group Sustainability Report, available to download from: report.localgiving.org/. Based on a survey of nearly 700 charities, the report gives heritage trustees a useful insight into some trends in the broader local charity sector, including the changing profile of income generation, with online giving growing in importance.

Introducing Beacon: a new programme for Chairs leading smaller charities

The Association of Chairs will soon be launching their 'Beacon' Programme, a new National Lottery-funded programme for Chairs and Vice Chairs of smaller charities (with an annual income of under £1 million) across England. Developed with Chairs of smaller charities, this programme will support Chairs to do their role effectively. The programme will offer a range of tailored activities, free practical written resources and webinars and opportunities for Chairs to share ideas and learn from each other. For more information or to sign up, go to: <https://www.associationofchairs.org.uk/beacon/lead/>

AIM plans to work with the Association of Chairs to run events especially for museum chairs, later in the year, and we are also considering how to extend our support for boards and trustees to the rest of the UK. For more information or to discuss the support you might need, please contact Helen Wilkinson, helenw@aim-museums.co.uk

In focus: accountability

In each issue of the AIM Heritage Trustee Newsletter, we'll be offering some quick fire tips on a challenging issue, written for AIM by Alex Lindley.

A plane and simple approach to accountability?

As trustees, we're often reminded that an essential element of how we work is ensuring accountability, both in terms of taking collective responsibility for the board's decisions and in holding others – like employees or volunteers – accountable for their actions. Sometimes, that can mean having to ask difficult questions or dig deep to investigate the causes of problems – and that's not always an easy or comfortable thing to do.

For one thing, trustees often (and rightly) aren't experts in the operational management of the museum, so questioning employees or volunteers who usually act as advisors to the board can feel awkward. For another thing, employees and volunteers might be anxious about board meetings if they feel – rightly or wrongly – that trustees' questions are persistently critical or that they are being judged negatively. In some cases, this can lead to a real breakdown of trust between the board and employees or volunteers.

So how can we hold others accountable in a supportive and constructive way?

Oddly, looking to the aeronautical industry could be a good place to start. Aviation's extraordinary safety record in recent history owes a great deal to the open and honest safety culture in the sector, where pilots are encouraged to report mistakes so that others can learn from their experiences and changes can be made to prevent future accidents.

To apply this principle to our work as trustees, we can:

Create a culture of continuous improvement in our museums, where people aren't afraid to make, talk about and learn from mistakes. If problems do occur, a small joint trustee, employee and volunteer working group could be a good way to explore what's happened, then to capture and share any learning or changes that should happen as a result.

Give regular, positive feedback over time to build a supportive organisational culture, so when challenging questions need to be asked, everyone feels that they come from a constructive – rather than a critical – perspective.

Have robust performance management processes in place so everyone is clear on their responsibilities, objectives and how progress is measured. After all, it's difficult to hold anyone accountable if they don't have a clear understanding of what's being asked of them. These processes can be tailored to suit the scope and scale of your museum and could include having individual role descriptions, as well as museum-wide goals, along with ways of monitoring progress against objectives – perhaps through regular 1:1s or group review meetings.

Like flying, creating this kind of culture of accountability might not be plain – or should that be plane? – sailing, but it's certainly a journey worth taking. Please encourage your fellow trustees to sign up if they don't currently receive the newsletter, by emailing: sassy@aim-museums.co.uk